

Section I:
AMENDMENT UNDER 37 CFR §1.121 to the
CLAIMS

Claim 1 (currently amended):

A method for organizing briefing packages for presentation to a sales account executive regarding client business entities managed by said sales account executive, said method comprising the steps of:

storing a plurality of client records relating to one or more client business entities, each client record containing a plurality of fields in at least one client account database, at least one of said fields containing a link to data, documents or information external to said database;

parsing a portion of an electronic mail message according to a predetermined format to determine a client record to which the message is to be linked;

integrating information to form a briefing package by linking said electronic mail message and at least one other external data item to at least one client record, said other external data item being selected from the list of a stock share price quote server, a business plan document, a marketing strategy document, a note from a previous meeting with said client, a previously presented presentation document and an action item list;

subsequently showing a first set of information for a selected client account on a main screen view on a user display by selecting a client record associated with a specific client business entity; and

providing in said first set of shown information one or more user-selectable expandable subforms, wherein at least one subform retrieves and shows at least one of said linked external data items when expanded.

Claim 2 (previously amended):

The method as set forth in Claim 1 wherein said step of parsing a portion of said electronic mail message according to a predetermined format comprises parsing a subject field for a client name indicator.

Claim 3 (previously amended):

The method as set forth in Claim 1 wherein said step of showing a first set of information comprises showing a stock share trading symbol for a selected client account.

Claim 4 (previously canceled).

Claim 5 (previously amended):

The method as set forth in Claim 1 wherein said step of providing comprises providing at least one hyperlink to a word processor document.

Claim 6 (previously canceled).

Claim 7 (previously amended):

The method as set forth in Claim 1 wherein said step of providing comprises providing at least one hyperlink to a computer-readable presentation file.

Claim 8 (previously amended):

The method as set forth in Claim 1 wherein said step of providing comprises providing at least one hyperlink to an action item list.

Claim 9 (previously amended):

The method as set forth in Claim 1 wherein said step of providing comprises providing at least one hyperlink to a biographical account of an employee for a selected client account.

Claims 10 - 23 (canceled).